DOCUMENT RESUME

ED 383 088 EA 026 742

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TITLE Site-Based Management in Education: Rochester City School District Case Study.
INSTITUTION Eastman Kodak Co., Rochester, N.Y.
PUB DATE 11 Mar 94
NOTE 17p.
PUB TYPE Reports - Descriptive (141)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Advisory Committees; Case Studies; *Decentralization; Educational Improvement; *Educational Planning; Elementary Secondary Education; *Participative Decision Making; *Partnerships in Education; *School Based Management; School Business Relationship
IDENTIFIERS Eastman Kodak Company; Rochester City School District NY

ABSTRACT

This paper describes outcomes of a partnership between the Rochester City School District (New York) and the Kodak 21st Century Learning Challenge consulting program for improving school-based planning team (S-BPT) operations. The purpose of the school-based planning team is to involve the entire school community in improving school effectiveness. Requirements for high-performing S-BPTs include: (1) establish structures and processes that encourage participation; (2) clearly define expectations; (3) include all key stakeholder groups equally; (4) use a consensus decision-making process; (5) limit team members' terms to a minimum of 2 years; (6) limit team size to 12 members or less; (7) consider participation as a professional-development experience; (8) limit districtwide initiatives to one or two a year; and (9) allow the school time to demonstrate outcomes. Recommendations are also offered for school-improvement planning and for maintaining ongoing support for shared decision making. The appendix contains a checklist for identifying decentralized decision-making responsibilities. Contains four references. (LMI)

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Site-Based Management in Education

Rochester City School District Case Study

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March 11, 1994

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Site-based Management in Education

Rochester City School District Case Study

Preface

This paper is intended for those in positions of responsibility that directly influence decentralized decision making programs in education. "Decentralized decision making" implies locating some decision making closer to those that are most affected by that decision. It results in higher quality decisions since those with the most timely and relevant experience put that information to use in those decisions. It also results in change that is implemented with more commitment.

In education, this usually implies school, or site-based teams as the first logical step. Throughout education the terms "school-based planning", "site-based management", "decentralized decision making" and "shared decision making" are used interchangeably. In this paper the phrase "School-Based Planning Team" (S-BPT) is used to imply site-based management in its generic sense. Some potential differences between these terms form the basis for the concluding comments section of this paper.

The recommendations made in the case study are based on : 1) relevant business experience, 2) four years of experience with school-based management in public schools, and 3) research (sited below). At the Eastman Kodak Company, we've accumulated decades of applied knowledge in "high involvement work cultures", autonomous or self-directed work teams, and participative management in general. This experience has been applied for the last four years in the Rochester City School District (RCSD) in New York State. It's hoped the learnings to date can positively influence others in their pursuit of decentralized decision making in education.

Nationally RCSD is considered a testing ground for innovative urban education reform. For the last six years, significant change has been initiated. Since the start all 51 schools (affecting the 60 sites) in the district have installed School-based Planning Teams to practice site-based management. For the last four years RCSD has partnered with the Kodak 21st Century Learning Challenge consulting program focused on improving S-BPT operations by transferring requisite skills to that school team and providing on-going support.

Currently, Kodak, and other companies, under Kodak's leadership, have consultants skilled in a variety of team development, Total Quality Management (TQM), facilitation, organization development and strategic planning skills. To date, the consultants work voluntarily in 33 schools and on nine projects sponsored by RCSD Central Administration. Expansion beyond this point is in process.

The consultants coach the principals individually, focusing on their leadership role, and their S-BPTs. Consultants provide long term support to the team, the school and the district. They attend each S-BPT meeting (typically held every other week) and meet with the principal between those sessions.

This paper is organized as follows :

I. Preface
II. Acknowledgements
III. Executive Summary
IV. RCSD S-BPT Case Study
    A. Successes
    B. Recommendations
        1. Policy Formation and Communication
        2. School Improvement Planning
        3. Ongoing Support
V. Concluding Comments
VI. Appendix
VII. References

The executive summary is generally applicable to shared decision making initiatives in education. From there, the experience in the Rochester City School District is referenced and built upon to act as a catalyst for change both in the district and for others in education.

Acknowledgements

This paper was made possible by the voluntary time, effort and expertise of those associated with the Kodak 21st Century Learning Challenge. It is a collaborative result of feedback received from consultants, principals, teachers, parents and others with relevant experience. Thank you for your time, energy and perseverance in the name of education excellence.

Executive Summary

A S-BPT Steering Committee, comprised of all key stakeholders (unions, line management-including school representatives, parents, board members and students) is essential in the early stages of concept development. Their role is to put in place, communicate and support a policy that addresses issues such as purpose, team charter, team membership/representation, compensation and general support systems. Their involvement decreases over time, dependent upon the maturity of the decision making demonstrated by schools. Ultimately their involvement is limited to policy review and enforcement meetings.

The purpose of the S-BPT is to enable the entire school community in improving the effectiveness of the school. This minimally amounts to clearly defining the school's aim, providing direction, empowering others and providing resources in support of continuous improvement. Empowerment can be accomplished through a set of interlocking teams, both up and across the organization. The primary focus is on student learning, and the team's role is to ensure community-wide resources are enabled towards that end. Essentially, the S-BPT defines the next level of "policy," adapting the district policy to their specific school.

To be effective, on-going access to an experienced change agent, one experienced in managing large scale change activities, is useful to develop the S-BPT policy, purpose, and practice. As practiced with Kodak 21st Century Learning Challenge consultants, this typically involves starting with team building activities to enable a complementary, collaborative and energized team. This progresses to skill development in the following areas: meeting management, strategic planning, TQM principles, and then to higher level organizational development. Higher level organization development would include, for example, the *redesign* of various systems, structure, behavioral systems, and processes in support of the school's vision.

As the culture of decentralized decision making is developed, evidence of increased student achievement is to be expected, however, not necessarily in the short-term. A long-term commitment to continuing the "journey" to high performance requires patience, perseverance and constancy of purpose. The initial stages (measured in years) are considered "setting schools up for success," building the foundation for years of self-sustained success. In this early stage, improvement can be expected in school climate, personal and interpersonal capabilities and so on.

A summary of recommendations, based on the RCSD experience, is summarized below:

Policy Formation & Communications:

- Completely define S-BPTs charter and be sure schools understand it
- Define success for S-BPT operations
- Include all "immediate" stakeholders with equal representation
- Utilize consensus decision making throughout the entire school community
- Extend the membership term length at least two years
- Limit team size to less than (approximately) 12 members
- Provide multiple forms of positive reinforcement for participation

Limit district driven initiatives to one or two per year

School Improvement Planning:

- Drive strategic and operational plans from an initial "common vision"
- Use a standardized format for plan documentation and communications
- Establish at least a three year rolling planning time horizon
- Build meaningful dialog into the planning (and maintenance) process
- Integrate down, up and across the school organization
- Regularly monitor and update the operating plan

Ongoing Support:

- Provide for continuous training including - district initiatives & policy, team building, meeting management, problem solving and planning
- Recruit experienced external change agents for coaching from business
- Establish a regularly scheduled forum for sharing and learning across schools

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This section builds upon readily "transferable" industry experience as applied over the last four years within RCSD. It's expected that this section can guide the policy makers in Rochester and also be beneficial for others in education. It's certain that these issues will become (or have already become) important factors in others efforts towards shared decision making.

RCSD S-BPT Successes

In six years there have been significant achievements. They are highlighted below to set the stage for the recommendations detailed later.

The majority of the successes were realized upon start-up, for example:

- spirit/vision resulting in granting schools increased autonomy,
- initial training (a high quality one week "retreat"),
- a well defined set of process guidelines,
- support materials (two notebooks of reference materials),
- work towards (but not concluded) policy definition and union buy-in,
- breadth of S-BPT implementation across district (all 51 schools),
- definition of School Improvement Plan goal areas including suggested performance measures,
- high quality "Improvement Planning process" available for schools.

Other positive outcomes were usually the result of eager individuals or teams willing to "go the extra mile" :

- business consultant, S-BPT & principal relationships (33 of 51 schools),
- pockets of excellence at individual school sites, for example .....
  - development of team ground rules,
  - S-BPT role in empowering other teams in the school,
  - effective meeting management,
  - application of TQM principles,
  - consensus decision making models applying to the entire school,
- establishing a number of pilot "site-based management teams" that have increased control over their school budget.

RCSD Recommendations

(Requirements for High Performing S-BPTs)

Policy Formation and Communication -

Susan Mohrman suggests in her "Managing the Change to Site-based Management" article that "the transition to SBM is best approached by establishing structures and processes that enable groups of people to discuss new directions, try new approaches and learn from them". In RCSD the "School-Based Planning Steering Committee" is responsible for establishing the district policy, consistent with this intent. Ideally this committee includes the key stakeholder groups experienced with current practice. This would include the Leadership Team, unions, Parent Council, Board of Education, students and business/community consultants. The temptation to hear "testimony" from experienced practitioners is avoided by making them a part of the committee and being clear that an expectation is ensuring broad consensus for their policy throughout the district.

This group starts by looking at what's working and what's not. The timeframe and process must allow for creativity and refer to the current documentation only after a draft of the new policy is outlined.

- <u>Chartering</u>: Expectations need to be clearly defined and schools need to completely understand these.

Any team or group formed needs to be properly "charged." The school is the most meaningful unit of change and Central Administration must work to enable the schools to be effective, that is to support their development. It needs to be made clear, by consistent, supportive action, that the S-BPT will have complete local decision making jurisdiction. An ideal opportunity exists with S-BPTs to charter them to make key decisions like school improvement targets, curriculum design, personnel evaluation and selection, professional development, budget development/monitoring, school structure, schedule, community engagement, etc. Each "decision" or topic considered to be "decentralized" is stated with any limitations clarified. One fairly comprehensive listing of topics to consider is included in the Appendix from Donald Nelson-Nasca.

The teams need to be clear that this responsibility is not to be taken lightly. They need to understand that all significant decisions need to be made by consensus, and incorporate the entire school community. Of course this implies a change in mindset, and a whole new set of intra-personal and interpersonal skills. Unless this is developed and understood district-wide, S-BPTs will not generally be successful. Today most schools don't understand that they have far more power than they exercise. This highlights the need for a community-wide dialog in defining the charter, and significant up-front skill building in implementation (see below).

- <u>Team Membership</u>: Include all key "stakeholder" groups with no one group set up to overwhelm others. Elections can be timed to coincide with the end of the school year.

Key stakeholders include teaching and non-teaching staff, school administration, parents, students (in *middle* and high schools). District Administration, business and community representation can also be considered. Constituencies elect their participants, and those people *are then empowered to act.* Provisions can be made to "unseat" those that are not satisfying their constituencies. Current policy requiring that the teaching constituency outnumber the others in total is counter-productive and has no place in an effective "consensus" decision making mode (see below).

Timing is important for preparation reasons. If S-BPT elections occur towards the end of the school year, teams will be prepared for training and updating their plans before the next school year starts. The early part of the school year is too consuming to expect significant additional workload.

- <u>Decision Making</u>: A consensus decision making process is encouraged for the team and throughout the school.

Today's method of decision making can best be described as either :
1) completely informal, resulting in weak follow-up support or, in some schools, as 2) "constituency voting" where status quo exists if each constituency does not "vote" in favor. Either way the result is little positive change, a strong reinforcement of the status quo.

If a matter is *important enough* to be brought to the S-BPT, the topic is worthy of a quality decision making process. Consensus decision making does not imply that all agree, but that all feel comfortable that they've been heard and can *support* that decision. This mode of decision making does not assure the highest *quality* decision, but it does insure the highest quality *outcome* (driven by commitment). After all, a decision not supported is one that's not implemented effectively, if at all. This is the key to avoiding subtle sabotage, the most common form of resistance to change. It also assures that even if the decision made is not of high quality, the group will recognize that in time and seek to improve it.

In this context, the consensus process is more than just a team decision making practice. It is the method used to drive change that all school community members can feel stake in implementing.

This decision making mode needs to be perfected within the team (at team meetings) before S-BPT members can be expected to gain consensus throughout the school community.

- <u>Term</u>: A term length minimum of two years facilitates significant changes (with provisions allowed for "re-election").

To effect major change, the S-BPT must be together for the entire "journey." It has been proven that fundamental change (what's required in schools today) takes place over a period of years (often three to five or longer). The team that remains relatively intact can be more successful than one that drastically changes from year to year. Having said that, if the team is successful in establishing consensus for plans within the school (and community), the effect of changing team membership is lessened. When changes are necessary, staggering new representation is sensible. New members need to be assimilated into the team, over the summer, with proper training, and S-BPT Policy/School Improvement Plan documentation.

- Numbers: Limit the S-BPT size to (approximately) 12 or less.

Research has proven that, for optimal performance, teams have approximately seven members. Given constituency representation that ideal may not be practical; however, the current policy results in a team too large to be effective (averaging 20 per school). Again, making the team responsible to drive the consensus process both within their constituency and throughout the school eliminates the need for large representative-based teams.

- Compensation: S-BPT participation is encouraged by considering time spent as professional development experience.

Effective S-BPTs are fundamental to meaningful school reform. If practiced correctly, S-BPT membership is seen as a privilege, a rewarding and learning experience for all. As often mentioned, capability development is necessary up-front and throughout membership. In addition, participation itself is an effective form of leadership development. This reinforces the notion that time spent should count towards individual professional development requirements.

Financial compensation is often mentioned as required to insure high quality representation; however, that's a symptom of the problems with S-BPTs today. Simply put, in most cases participation on S-BPTs is not rewarding often with no clear results to show. Team members give up limited personal time to deal with minor, fire-fighting issues, during poorly run meetings. The experience of leading and managing major reform can be motivation enough for membership.

Given the current experience, the district needs to show its commitment to this "initiative." This commitment can be most visible through the development of a high quality, collaborative policy and in ongoing support, not in compensation that the district can more strategically utilize.

- Doability: Limit the District-wide initiatives, that schools must internalize, to one or two per year.

Making the revitalization of S-BPTs one of very few district initiatives will dramatically raise the probability of success. This can be thought of as another way to demonstrate the importance of and commitment to empowering school-driven change. Schools cannot be expected to pay attention to (let alone institutionalize) more than one or two significant district programs per year. They should already be working towards significant self-initiated improvement.

This same change is consistent with thoughtful practice of the Pareto Principle. Eighty percent of the impact can be realized by focusing on the critical few projects (taking twenty percent of the effort).

- <u>Constancy</u>: The S-BPT policy needs to clearly define success, and schools need time to be able to demonstrate that performance.

As with any major initiative, it's critical that the district stay the course long enough to prove success (years, as stated above). Once adequate up-front time is dedicated to defining success (see Chartering above), continuous improvement should be focused upon the level and type of support provided to schools. This is contrasted to drastic changes in policy which results in schools trying to hit a moving target. That's not to say that policy changes should not be made but they should be based upon continually *monitoring performance* over a fair trial period.

<u>School Improvement Planning -</u>

Initially, developing and implementing an improvement plan was the "only" expectation of S-BPTs. Guidance was provided for areas to consider, and teams were provided with TQM tools for their school assessment. Plans were to cover three years with complete re-assessments due every third year. The task seemed appropriate and was, again, initially well supported. The following changes can be recommended:

- <u>Building a Common Vision</u>: Schools need to develop a comprehensive vision and mission before being expected to build a meaningful School Improvement Plan.

Today, schools put together a school improvement plan because they *have to*. They comply with this along with other "regulations" imposed upon them. To realize meaningful positive change, community commitment is necessary. Commitment is driven by personal connection to a common cause or purpose. Unless schools are encouraged to collaboratively build that "common cause" *before* they develop their school improvement plan, the commitment issue will always force the process backward. A "vision" that articulates a future all can aspire to will energize people. This vision cannot be limited to a ten word slogan that can easily be memorized and framed on a wall. It has to be a visualization of what can be, in a complete sense. If this vision incorporates all the major elements of structure, support systems, learning processes and outcomes the resulting plans will, by definition, be systemic in nature.

- <u>Format</u>: A standardized format for School Improvement Plans is helpful for schools and Central Administration.

Current plans tend to be housed in notebooks and very "activity" or tactically oriented. For S-BPT members (and also for the rest of the school staff who are already busy) it's very difficult to embrace, communicate and even act upon. Using a "strategic framework" similar to that used at Kodak, and other companies, helps schools get down to the critical "strategic" questions that need to be addressed before you can operationalize any meaningful change.

Key planning issues like vital performance measures, meaningful goals, substantive strategies and an action plan that is easily monitored are facilitated by that format. The format itself forces strategic dialog and enables effective communications. It helps define "school success" and enables community-wide mobilization towards the plan. An action plan that covers 12 to 18 months can be used to activate improvement projects. This action plan is required to bring the plan to life (see below).

A format consistent across schools also enables Central Administration to define and provide timely, targeted and welcome support to schools.

The development of the framework/format itself requires substantial sustained attention by a group reporting to the Steering Committee mentioned above. Careful consideration of required elements will pay dividends down the road and must be defined before the requisite training of S-BPTs.

- <u>Planning Horizon</u>: A "rolling time horizon" is helpful to keep the plan accurate and up to date.

A "rolling time horizon" helps keep plans vital and on target. The three-year timeframe is fine if as each year passes, the next year is added. Just changing the date posted on a plan doesn't, however, change the content. A fresh perspective, applied first at the strategic level to verify former assumptions, will result in a recommitment to the strategic plan. As time moves on, updates to the action plan should be made as new implementation information (execution and measurement data) becomes available. If the ground work covered in last year's plan is well thought out and documented, these revisions need not be the consuming "exercise" it often is today.

- <u>Living Plan</u>: Ultimate accountability for the implementation of the plan rests with the S-BPT, regular updates need to be a part of each team meeting.

Many plans (from both industry and education) start with intensive, consuming up-front effort only to result in a plan that collects dust. Unless the plan has team, group and individual *accountability* built into the action plan, it remains meaningless. S-BPTs need to "cycle through" a portion of that action plan each meeting. Progress is evaluated so that wayward effort can be corrected, plans can be revisited, and *celebrations can take place*. The worst plans are those that never change, since that implies they are never implemented!

- <u>Communications</u>: Continuous *dialog* (both within and outside of the school) is necessary to build and maintain a plan that's robust and on target.

Linkages with parents and the community are especially problematic today. As a remedy on the community side, annual "Town Meetings" take place. These update the community on last year's progress and inform attendees of future plans.

Town meetings are an excellent way to build community support for the important work schools take on. The broader the base of support within the community the more successful they will be. Communication of the School Improvement Plan, during revisions and after it's "complete," should be an important part of more frequent (perhaps quarterly) two-way communication meetings. Ongoing, real-time, communications systems that link all stakeholders/constituencies is an ideal that can be approached.

Potential remedies for the parent/guardian communication gap could fill a text book. Suffice it to say that a number of alternative strategies, based on different situations/needs, can be built into the School Improvement Plan.

- Integration w/ District Initiatives: District initiatives can be internalized at schools through integration into the plan and up-front training for S-BPTs.

Just as dialog with the community is critical, so is dialog between the school and Central Administration. Evidence of successful integration of district-wide initiatives and state-driven compliance issues can reside in each school's plans. Again there needs to be accountability for implementation via regular updates *between the school and the school's district liaison* (with others as appropriate).

Implementing this recommendation is facilitated by a active sense of *partnership* between District Administration and the schools. In this scenario Central Administration adopts a service attitude, becoming a key resource for school reform.

Further insight on the required elements of a school's plan can be found in the Myron Tribus article "The Transformation of American Education to a System for Continuously Improved Learning."

Ongoing Support -

Ongoing support is especially important when decentralized/shared decision making is relatively new, as with RCSD.

- Training: Training is a *continuous* need. Core skill areas include: district policy and key initiatives, team building, problem solving techniques, and strategic/operational planning.

Knowledge and skill is built by thoughtful, continuous and high quality training/development opportunities. As described earlier, new S-BPT expectations drive a need for skills largely not present in today's system. Initially, significant provisions can be for new teams to build their maturity. Team building activities should be provided that familiarize S-BPTs with themselves, their teammates and finally their responsibilities.

As mentioned earlier the ideal time for training of this type is over the summer, just before the new school year. If school teams are to be responsible for planning they need the required strategic and operational planning skills (e.g. customer feedback, strength/weakness assessments, goal setting, project planning, expertise). The proper TQM training, applied in an experiential way will be very beneficial. Proper meeting management and interpersonal skills are certainly appropriate.

Care is called for to avoid the "one size fits all" scenario for professional development. No two teams are alike, and similarly it can be argued that the development offered for parents should be different than that for students, etc. Modules, custom to that team/situation, can be provided in "bite-sized chunks" and applied while learning.

Without going further, there are already nearly two weeks of "training" in total to be considered. Certainly, without an understanding of the S-BPT "charter" as discussed above, specification of the skill development requirements beyond the basic fundamentals mentioned above are premature.

- <u>School Resource</u>: Both internal and external change agents need to be available to schools for coaching individuals, groups and teams.

An outside resource, experienced in team development, shared decision making, strategic planning and organization development is an important resource to S-BPTs. This person (available roughly 2-4 hours per week) need not be from outside the district. Business has proven experience in these areas. Partnerships like those between RCSD and Kodak need to become commonplace.

Combining team and individual consulting works very effectively. Critical individuals targeted for support would likely include team leaders, and the school principal. Beyond S-BPTs, team coaching/consulting help should be provided to select parent/teacher/students, community teams, improvement task teams and teaching teams. The Rochester Business Education Alliance (with their linkage to over 30 local businesses) should be a key source for this help.

Long-lasting change requires the development of internal change agents with much the same skills mentioned above. These internal "facilitators" are responsible to, in turn, develop the capabilities of others. They need to be planned for in a "master personnel plan" that includes succession planning, development opportunities, etc.

- <u>Forum for Sharing & Learning</u>: Opportunities to learn what's successful and what's not need to be provided for S-BPT (especially early on).

Isolationism has never proven successful for any entity. Active sharing as a means to learning works in classrooms and is important here as well. Meetings where those with successes (easily identified) are called upon to lead a dialog with their peers. These sessions should decrease in frequency as S-BPTs become more comfortable with their new role.

The Kodak Consultant Roundtable exists for this same reason and has been successful. Monthly meetings include the consultants, invited guests and district personnel. This "model" can be extended to more S-BPT members and lead by district personnel.

Concluding Comments

The situation in Rochester is a useful testing ground for decentralized decision making in education, this paper is intended to be a springboard for objective reflection on our experience.

As we consider what decentralized decision making would ideally look like, the current situation in Rochester needs to be put aside. Sharing decision making is a worthy means to an end that must first be made clear. The "end" is an environment where the student, teacher and parent/guardian are all "empowered" to develop the intellectual, social, emotional and physical capabilities of that student. Empowerment in this sense means that the three have the skill, the will and the authority to develop that student's potential.* With that end in mind, S-BPTs (and, in fact, the entire community-wide system) need to provide the best in proven skills, ensure the support is there and drive the "power" of decision making to the lowest level, to that trio. Empowering that group becomes the charter of school administration and all resources are directed accordingly.

"Shared decision making" in that context translates to locating nearly all day-to-day decisions, responsibilities, and many others with those that have the most information on student learning and can most effectively employ that information.

* an excellent resource, and description of "empowerment" can be found in "The Total Quality Paradox : Why Isn't TQ Working? -- How We Can Make It Work" by Sherwood and Hoylman

APPENDIX

IDENTIFYING DECENTRALIZED DECISION MAKING RESPONSIBILITIES: A CHECKLIST

Where should major participation come from in reaching decisions in the following areas/issues?

	Site	Central	Collaborative
OUTCOMES			
Analyzing Community needs	___	___	___
Creating a district mission statement.	___	___	___
Creating building mission statements.	___	___	___
Setting graduation requirements.	___	___	___
Setting graduation standards.	___	___	___
Setting program requirements.	___	___	___
Setting program standards.	___	___	___
Establishing annual student goals.	___	___	___
Setting student learning outcomes.			
Individual Programs	___	___	___
Courses of study	___	___	___
Grade level outcomes	___	___	___
EVENTS			
Establishing academic year schedule	___	___	___
Establishing daily schedule	___	___	___
Assigning students to schools	___	___	___
Assigning students to classes	___	___	___
Evaluating placement of transfers	___	___	___
Assigning teachers to classes	___	___	___
Defining instructional strategies	___	___	___
Setting priorities for staff development	___	___	___
Defining supervisory practices	___	___	___
Defining teacher evaluation strategies	___	___	___
Defining administration evaluation strategies	___	___	___
Defining student evaluation strategies	___	___	___
Defining reporting to parent format	___	___	___
Establishing extracurricular activities	___	___	___
Creating student discipline code	___	___	___
Designing curriculum	___	___	___
Monitoring state mandates	___	___	___
Monitoring district policy	___	___	___
Preparing budget	___	___	___
Allocating funds	___	___	___
Policy recommendations to Board	___	___	___
Analyzing student characteristics	___	___	___
Defining entry requirements	___	___	___
Preparing student enrollment projections	___	___	___
Selecting staff	___	___	___
Determining space utilization	___	___	___
Selecting textbooks	___	___	___
Selecting instructional materials	___	___	___
Preparing job descriptions			
Teacher	___	___	___
Support personnel	___	___	___
Classified personnel	___	___	___
Administration	___	___	___
Determining building needs	___	___	___
Determining construction/maintenance needs	___	___	___
Defining cleaning/repair priorities	___	___	___

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